



Checklist: How to review your Will

Since making your last Will:

About You	Yes	No
Have you got married?		
Have you got separated or divorced?		
Are you now living with a partner?		
Have you had children?		
Do you have more children now than you have named in your Will?		
Have your financial circumstances changed significantly?		
Have you given away or sold any item specified as a gift in your Will?		
Do you own property abroad?		
Do you own a business / share in a business?		
Are you concerned about Inheritance Tax?		
Beneficiaries		
Have you changed your mind about who should inherit?		
Have any of your named beneficiaries died?		
Have any of your beneficiaries changed their names or address?		
Are any of your beneficiaries vulnerable due to age, disability or lifestyle?		
Do you want to find out how Trusts can help protect assets for future generations?		
Guardians		
Have you changed your mind about who should act as guardians?		
Do you have any concerns about the age, health or mental capacity of your guardians?		
Executors/ Trustees		
Have you changed your mind about who should act as executors/trustees?		
Do you have any concerns about the age, health or mental capacity of your executors/ trustees?		

Have you answered 'yes' to any of the above?

Contact us today to review your Will